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Installation Guide for

# **EDExpress for Windows**

2004-2005

**U.S. Department of Education**



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**F E D E R A L  
S T U D E N T A I D**

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# Introduction

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## Preface

EDEExpress is a fully integrated software package provided by the U.S. Department of Education (the Department) that allows schools to process, package and manage student financial aid records electronically in an easy-to-use Windows format. The following modules are available in EDEExpress:

- Application Processing – For managing your Free Application for Federal Student Aid (FAFSA) application data. Beginning with EDEExpress for Windows 2004-2005, Release 1.0, the software interfaces with the FAA Access to CPS Online Web site. You no longer will export and transmit FAFSA or Institutional Student Information Record (ISIR) correction data to the Central Processing System (CPS) through the Student Aid Internet Gateway (SAIG). Instead, the FAFSA tab and the ISIR Inquiry tab (formerly the SAR/ISIR tab) will connect directly to FAA Access to CPS Online for entering and submitting data directly to the CPS.
- Packaging – For packaging financial aid awards for your students.
- Direct Loan – For originating loans, printing promissory notes, and submitting disbursement records.
- Pell – For processing Federal Pell Grant award and disbursement data for your students.

EDEExpress for Windows 2004-2005, Release 1.0, contains the Application Processing and Packaging modules. Release 2.0 contains the Direct Loan and Pell modules.

See the “What’s New for 2004-2005” pull-down menu item under **Help** for a comprehensive list of product enhancements.

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# **EDExpress Features**

## **Integrated PC Software Package**

EDExpress is a fully integrated PC software package that allows you to create and manage a database of financial aid records. Cross-module functions include:

- Maintaining application databases
- Tracking the receipt of student documents
- Creating student financial aid award packages
- Printing award letters
- Generating Pell and Direct Loan documents for transmission to the Common Origination and Disbursement (COD) system
- Importing processed data files from the CPS and COD into your database
- Exporting external files for use in other school software
- Importing external files to update records prior to exporting and transmitting to COD
- Querying a student database
- Generating and printing reports
- Creating user-defined fields
- Setting passwords and controlling user access
- Using online Help for instructions on all software functions

## **Access 2002**

Past EDExpress software releases have used databases built on a Microsoft Access 97 framework. For EDExpress for Windows 2004-2005, Release 1.0 and forward, we will be using a Microsoft Access 2002 database framework. Please note the following:

- Access 2002 software databases will run on all currently supported Microsoft Windows operating systems, which include Windows 98, Windows NT, Windows 2000, Windows Me, and Windows XP.
- You do NOT need to have any version of Microsoft Access (97 or 2002) installed on your PC to run current or future releases of EDExpress.
- You will not be able to open or view the EDExpress for Windows 2004-2005, Release 1.0, database or other future software releases using Microsoft Access 97. Microsoft Access 2002 databases are incompatible with Microsoft Access 97.

The Department continues to strongly discourage users from viewing and/or manipulating any EDESuite software database using Microsoft Access. Making changes to the software database (using any version of Microsoft Access) can potentially cause damage to the database structure and proper software functionality, and limit our ability to support problems you may encounter as a result.

If you do choose to access any Department software database using Microsoft Access, you should ensure you are viewing a copy of the database file and not your live, “production” database file. You should also ensure you have a safe, reliable back-up of your software database(s) created prior to using Microsoft Access to access live or back-up copies of your software database(s).

**Important Installation Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install EDEExpress. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. Once an Administrator has installed EDEExpress, you can run EDEExpress for Windows 2004-2005 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Please consult with your school’s technical department if you receive a warning that an Administrator must install the EDEExpress software.

## Demographic Record

The EDEExpress database is organized around a feature called the demographic record. Each student in your database has a demographic record that stores the student’s address, telephone number, Social Security Number (SSN), and other demographic information.

When you enter or edit a student record, you start from the demographic record screen and access the student’s other financial aid records from there; for example, you can access a student’s packaging information by clicking on the Awards tab, and Pell/Direct Loan data by clicking on the Origination or Disbursement tabs.

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## EDconnect

The Student Aid Internet Gateway (SAIG) is the Department's information highway, linking members of the financial aid community with Federal Student Aid (FSA) and the Title IV Application Systems. FSA provides the EDconnect software to make it possible to send and receive data through the SAIG.

You can download the *SAIG Desk Reference for EDconnect* and *Installation Guide* from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov).

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## Using This Installation Guide

Use the instructions contained in this Installation Guide to install the EDEExpress for Windows software on your computer or local area network (LAN).

In this guide, you will find information on hardware and software requirements, estimating the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

See “Installation Instructions” in this guide for additional instructions.



# Installation Instructions

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## Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing EDEExpress on a single-user system.

We provide instructions for network system installations in the “Local Area Network (LAN) Information” section of this guide.

Other topics included in this section are:

- Default folder creation with installation
- FSAdownload Web site
- Downloading documentation and software from the FSAdownload Web site
- Installing the software
- Installation log
- Changing the database path for EDEExpress
- Uninstalling the software

## Folder Creation

The installation process automatically creates the following folder for EDEExpress files on your local hard drive:

**C:\Program Files\EDSuite\EDEExpress for Windows 2004-2005**

The installation program assumes that the C: drive is your local hard disk, but you can change the drive letter if necessary. Also, you may use a different name for the folder.

**Caution:** You may change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each EDEExpress software update you receive for enhancements to be loaded properly.

## FSAdownload Web Site

You can download the EDEExpress software in two formats from the FSAdownload Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov). You can download the entire software in one file, called express45rX.exe (where X is the release number) or you can download the software in separate installments, which you can copy to a network drive or diskettes. See “Downloading Software from the FSAdownload Web Site” in this guide for more details.

Once the software download is complete, be sure all Windows applications, including screen-savers and e-mail notifiers are closed. Follow the prompts provided by the software when installing EDEExpress.

## Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting documentation from the FSA Web site at <a href="http://FSAdownload.ed.gov">FSAdownload.ed.gov</a> .	Read “Downloading Documentation from the FSAdownload Web Site” for instructions.
2	Download the software from the FSA Web site at <a href="http://FSAdownload.ed.gov">FSAdownload.ed.gov</a> .	Read “Downloading Software from the FSAdownload Web Site” for instructions.
3	Install the software.	Read the “Installing the Software on a Single-User System” section for instructions.

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## Downloading Documentation and Software from the FSAdownload Web Site

You can download FSA software from the Internet on the Department's Federal Student Aid Download (FSAdownload) Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov). This site also houses FSA documentation such as the EDEExpress Desk References, Technical References, and Cover Letters for easier and more efficient use of EDEExpress.

### Sample Download Times

The amount of time it takes to download a file depends on the file size and the speed of the Internet connection. If you do not have a direct connection to the Internet, we recommend a 56 kbps modem.

The table below shows approximate download times for various file sizes and connection speeds. The actual times vary depending on the type and quality of your Internet connection.

<b>Download Speed</b>	<b>1 Megabyte</b>	<b>5 Megabytes</b>	<b>10 Megabytes</b>
33.6 kbps	5 min.	25 min.	51 min.
56 kbps (53 kbps)	3 min.	16 min.	32 min.
768 kbps or higher (typical for cable modems and DSL)	15 sec. or less	1 min., 15 sec or less	2 min., 30 sec or less
1.5 mbps or higher (typical for T1 lines)	7.5 sec. or less	37 sec. or less	1 min., 15 sec. or less

### Getting Help

Some organizations restrict their users from downloading files from File Transfer Protocol (FTP) sites.

- If you are having trouble downloading (for example, you are prompted for a user ID and password or just cannot download), try again later.
- If you are still unable to download, contact your technical support staff to ensure you have full FTP download rights.

## Downloading Documentation from the FSAdownload Web site

You can download FSA documentation from the Internet in Adobe PDF (Portable Document Format) format.

The following types of documentation are available to download for EDExpress:

- Cover Letters
- Installation Guides
- Desk References
- Technical References

Each document has the date it was posted, file size, and approximate download time. However, the length of time it takes to download a paper document depends on the speed of your Internet connection.

### ***To Download Documentation***

1. Go to the address field located at the top of your browser's screen and type [FSAdownload.ed.gov](http://FSAdownload.ed.gov). You may need to press the **Enter** key or click the **Go** button.
2. Click on the **Software and Associated Documents** link.
3. Click **EDExpress 2004-2005 Release X** (where X is the release number) to the left of this description. You are taken to the download site.
4. Choose the type of documentation you want to download by clicking the appropriate **PDF Format** link associated with the file.
5. If you would like to save a copy of the document to your system click **File, Save As** from the browser menu bar. Select a location on your computer, and then click the **Save** button to save the file. If **Save As** is not available, you can also click the diskette button to select a location to save the file to your computer. The Web site is designed to give the file a default name; however, you may choose another name for the file.
6. Once the document is downloaded, go to the saved location and double click on the file to open and print it.

## Downloading Software from the FSAdownload Web Site

We distribute EDEExpress and its related documentation through the Internet using the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, [FSAdownload.ed.gov](http://FSAdownload.ed.gov). The software is available in two formats. You can download the entire program in one file (express45rX.exe [where X is the release number]), or in separate installments, which can be copied to a network drive or diskettes.

### *To Download the Software as One File*

1. Go to the URL (Uniform Resource Locators) field located at the top of your browser's screen and type [FSAdownload.ed.gov](http://FSAdownload.ed.gov).
2. Click the **Software and Associated Documents** link.
3. Click the **EDEExpress 2004-2005 Release X** (where X is the release number) link. You are taken to the download site.
4. Click the **Full Download** link in the software section to download the program as a single file. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.
5. Select the download location and click **Save**.

**Note:** The length of time it takes to download the software depends on the speed of your Internet connection.

6. Once the file is downloaded, go to the saved location and double click **express45rX.exe** (where X is the release number) to extract the file and install the software.

**Note:** See "Installing the Software on a Single-User System" or "Installing the Software on a Network."

### ***To Download the Software in Separate Installments***

1. Go to the URL field located at the top of your browser's screen and type [FSAdownload.ed.gov](http://FSAdownload.ed.gov). You may need to press the **Enter** key or click the **Go** button.
2. Click on the **Software** link on the left-hand side of the screen.
3. Click the **EDExpress 2004-2005 Release X** (where X is the release number) link. You are taken to the download site.
4. Click the **Disk 1** link in the software section to download the program as a single file. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.
5. Select the download location and click **Save**.

**Note:** The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the download of Disk 1 is finished, click **Disk 2**. Save Disk 2 to the same location as Disk 1.
7. Click each succeeding disk until they have all been saved to the same location on your computer.
8. Once the software disk files are downloaded to your computer, go to that location, double-click **disk1.exe**, and unpack it to the same folder where the other disks were downloaded. Disk 1 is a self-extracting zip file. Then double-click on **setup.exe** to install the software.

**Note:** See “Installing the Software on a Single-User System” or “Installing the Software on a Network.”

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# Installing the Software on a Single-User System

Downloading the software from [FSAdownload.ed.gov](http://FSAdownload.ed.gov) does not install it. After downloading the software to your computer, you must install it. For installing the software on a LAN, see “Installing the Software on a Network” in this guide.

EDEExpress consists of four modules: Application Processing, Packaging, Direct Loan, and Pell.

The Application Processing module installs automatically. In addition to application processing functionality, this module contains the basic global setup options (for example, security and system functions) for all modules. You need to complete these setup options prior to processing your Title IV financial aid data with EDEExpress.

EDEExpress for Windows 2004-2005, Release 1.0, includes the Application Processing and Packaging modules. Release 2.0 contains the Direct Loan and Pell modules.

**Important Installation Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install EDEExpress. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. Once an Administrator has installed EDEExpress, you can run EDEExpress for Windows 2004-2005 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Please consult with your school's technical department if you receive a warning that an Administrator must install the EDEExpress software.

## Installation Options

You can install the software to a standalone PC using one of two options:

1. **Stand Alone Full.** Use this option when you are installing EDEExpress for Windows 2004-2005, Release 1.0, to a single, non-networked database for the first time and want to install all available EDEExpress software modules.

**Warning for Subsequent Installations:** Use caution when using the Full installation option. The program overwrites, removes, and erases your existing EDEExpress database (expres45.mdb) and all program files (including expres45.exe), as well as any annotations you may have made to online Help.

2. **Stand Alone Custom.** Use a Custom installation in one of two ways on a single non-networked database. If you have previously installed a module the module will not appear in the Select Components dialog box, it will automatically be installed.
  - If you have already installed a full release of EDEExpress, you can use this option to add a particular file or files; for example, executable (\*.exe) files, database (\*.mdb) files, and help (\*.hlp) files. This option leaves all other database and system settings intact (unless you select \*.mdb files).
  - To upgrade the software, choose the Custom installation option and select all the files except your existing database files (\*.mdb). NOTE: For EDEExpress for Windows 2004-2005, Release 1.0, Full installation is the default selection.

## Steps to Install

1. Be sure all Windows applications, including screen-savers and e-mail notifiers, are closed.
2. If you downloaded the expres45rX.exe (where X is the release number) file from the FSAdownload Web site, go to the location of that downloaded file.
3. Double-click the file to open and install it. The file decompresses itself into a temporary folder (usually "c:\temp") and continues the installation from there.
4. EDEExpress asks you a series of questions during the installation. These questions verify the location of the software on your hard drive. Each question has a default answer.

**Note:** You must click **Yes** if you get a message asking if you would like to overwrite a read-only file when installing the software.

- If the default answer is correct, click **Next** to go to the next screen.



- You may change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each EDEExpress software update you receive for enhancements to be loaded properly.
5. Continue this process until you reach the last installation screen, which prompts you to click the **Finish** button.
  6. When the installation program is finished installing the EDEExpress files, it updates your Start menu. However, it does not create desktop icons or shortcuts, and it does not update them if they were previously created. You are prompted to reboot the system to complete the installation.

## Installing Subsequent Releases

When you install a release of the software that is an update to a version of the same year, a special process updates the database. The update process occurs the first time the software is initialized after installing the software upgrade. It runs only once, whether on a stand-alone or networked database. If there are no updates to the database, this update will not occur.

**Note:** See “Installation Options” of this installation guide for more information about installing subsequent releases.

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## Windows Installation Log

Each time you perform an installation, an installation log is created in the Windows directory of the workstation (for example, c:\winnt) and is named EDEExpress<release number>.log. The Windows installation log is updated during each installation and contains a detailed record of all files affected during the installation of the application.

The information tracked in the Installation Log is the Installation directory, Windows Directory, Windows System Directory, if a CD-ROM is available, screen resolution, disk space available, boot drive, install engine, extended memory, information about files before installation and information about files after installation. This information can be helpful to users and to CPS/WAN Technical Support in researching software issues that may occur.

**Note:** In past versions of EDEExpress for Windows, users received a prompt to “view the Install Log” at the conclusion of the installation process. The installation log referred to by this prompt was a less detailed file than the Windows installation log, and has been removed for EDEExpress for Windows 2004-2005. You will not receive a prompt to review the Windows installation log at the conclusion of your installation of EDEExpress for Windows 2004-2005, although the log file will be created and can be viewed at any time.

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# Changing the EDEExpress Database Path

You can change the EDEExpress database path from within the EDEExpress software.

**Note to Windows NT Users:** To change the EDEExpress database path, you must have Windows NT administrator access rights.

## To Change the Database Path

1. Open EDEExpress and select **Help, System Information**.
2. Click the **Files Information** tab.
3. Click the **Registry** button.
  - A Registry Viewer application displays with a split view.
  - In the left window, you see a tree-view style window, and in the right window, you see a list-style window with two fields: **Name** and **Value**.
  - Select EDEExpress under Year45.  
If you do not see the “Year45” label in the left window:
    - Single left click on the + (plus sign) next to EDESuite.
    - You will see a label indicating the software’s year cycle under EDESuite.  
If you do not see the “Express” label in the left window:
      - Single left click on the + (plus sign) next to Year45.
      - You will see a label indicating the software’s name.
      - Highlight the name of the software.
4. On the right side of the split screen, find **Database** under the **Name** field, click it and select **Edit, Edit** from the main menu.
  - A **New Registry Value** dialog box displays with two edit boxes.
  - One box has a label of **Name** (which is disabled) and the other box has a label of **Value**.
5. Enter your new database path in the entry box next to **Value**. Include the full path and database name (expres45.mdb) exactly as it appears in Windows Explorer, with uppercase and lowercase letters.

6. Press **Enter** or click **OK**.
7. A message appears indicating that the registry value is saved. Click **OK**.
8. Exit the **Registry Viewer** by going to **File, Exit**.
9. Click **OK** to exit the System Information dialog box.
10. **Exit** the EDEExpress software.

The next time you start EDEExpress, you will connect to the database using the new database path. You can confirm your connection to the new database by viewing the current database name and location in the status bar at the lower right-hand corner of the EDEExpress window.

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# Uninstall

To uninstall EDEExpress, click **Start, Programs** from your Windows Desktop and select **EDESuite, EDEExpress 2004-2005** to see an icon for the Uninstall utility.

Choosing Uninstall deletes all icons created during the installation of the software from the start menu, the software's program group, all executable files, all Dynamic Link Library (DLL) files, and the entire database for the release of EDEExpress you have installed.

If EDEExpress is installed on a LAN, the Uninstall utility deletes all EDEExpress files (\*.dll) and icons, but not the database file on the network.

**Note to Windows NT Users:** To uninstall, you must have the same or greater Windows NT access rights as the person who originally installed EDEExpress.

## To Uninstall EDEExpress

1. Double-click on the **Uninstall** icon. A prompt asks if you are sure that you want to completely remove the application and all of its components.
2. Click the **Yes** button.
3. Click **OK**.

EDEExpress may also ask you additional questions during the Uninstall process. Click either **Yes** or **No** in response to these questions.

**Warning:** Do not uninstall the software if you are performing a Custom installation.

# Getting Started

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## Logging In for the First Time

The first time you start EDEExpress, the Startup Information box displays. You need to become familiar with the Startup Information box, how to enter a user ID and password, how to create a new password, and how to establish your school as the assumed school used by EDEExpress. We provide instructions for these tasks in this section.

### Startup Information Box

The first time you launch EDEExpress, you see the **Startup Information** box. This box displays various messages, warnings, or errors. One of these messages alerts you to establish your Assumed School Code.

See “Setting your Assumed School Code” for step-by-step instructions.

### *To View and Close the Startup Information Box*

1. The first time you access EDEExpress, the **Startup Information** box displays.
2. Review the messages, warnings, or errors displayed.
3. Click **Close** or press **Enter** to close the **Startup Information** box.

## User ID and Password

Each time you start EDEExpress, you must enter a valid user ID and password.

EDEExpress requires a unique user ID and password for each user for system security.

### ***To Access EDEExpress for the First Time and Establish Your New Password***

1. Type in the default user ID, **SYSADMIN**.
2. Type in the default password, **SYSADMIN**.
3. Type your **new password** in the New Password text entry box. You must change the default password by typing a new one in this field.
  - You may enter up to eight alphanumeric characters.
4. Type the **new password** again in the Verify Password field.
  - The New Password and Verify Password must be the same.
5. Click **OK** to log in.

**Note:** The SYSADMIN user ID should be reserved for system administrator functions. All users should have a unique user ID and password for logging into the software.

Refer to the topic “Security” within the online Help for information on setting up user IDs and passwords for your staff.

After you enter your new password, set up your Assumed School Code. See “Setting Your Assumed School Code” for step-by-step instructions.

## Prior Year Data Dialog Box

You can save time when you set up EDEExpress for Windows 2004-2005 by importing setup information and other customized fields from the EDEExpress for Windows 2003-2004 database.

If you have a prior year release of EDEExpress installed (for example, EDEExpress for Windows, version 9.2), EDEExpress for Windows 2004-2005 allows you to import most setup features from EDEExpress for Windows, version 9.2, saving you setup time. EDEExpress for Windows 2004-2005 allows demographic data, most setup information, most queries, and any file formats you have created to be moved forward from the prior year. Prior Year Disbursement Profiles for the

Direct Loan and Pell modules that are imported will need to be updated and saved successfully before they can be used.

### ***Data That Can Be Moved Forward from the EDExpress for Windows 2003-2004 Database***

- Query—Global, App Express, Packaging
- Global Setup
  - Security Groups
  - Security Users
  - Document Tracking
  - User-Defined Letter Text
  - System
  - File Management
  - User Database
- Application Processing Setup
  - System
  - File Formats
- Packaging Setup
  - Academic Year Profiles
  - Fund Maintenance
  - Award Methodologies
  - Budgets
  - File Formats
  - SAP Values
  - System
  - User-Defined Formulas

### ***Data That Will Not Be Moved Forward***

- Queries that Reference Modified/Deleted Fields, or Date Parameter
- Packaging Fund Maintenance Fund Amounts

**Important Note:** If you import Security Groups, access rights for the groups do *not* carry forward. You will need to reassign access rights for the groups in Security Groups setup.



After logging into EDEExpress for Windows 2004-2005, Release 1.0, you are prompted with the **Prior Year Data** dialog box that allows you to import your prior year user-defined queries, setup, and demographic data from EDEExpress for Windows, version 9.x.

If you do not want to perform this function at this time, but want to be reminded each time you log in, click **No** and do not check the **Don't show me this again** box.

If you do not want to be reminded to perform this function, check the **Don't show me this again** box and click **No**. You can import prior year data at any time by going to **File, Import** from the main menu, choosing **Global**, and selecting **Prior Year User-Defined Queries, Setup, and File Formats** as the Import Type.

### ***To Perform the Import of Your Prior Year User-Defined Queries, Setup, and File Formats***

1. Click **Yes** at the **Prior Year Data** dialog box.
2. Confirm that **Prior Year User-Defined Queries, Setup, and File Formats** appears as the Import Type.
3. Verify the location of your 2003-2004 EDEExpress for Windows database (expres34.mdb).
4. Select **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and name the file.
5. Click **OK**. The **Prior Year Move Dialog** appears.
6. Select the items you want to import by checking or unchecking the boxes in the Import column.
7. Select one of the following import options:

**Import All records for Setup Options Selected** imports all records without prompting you to select specific records.

**Import only Specific records for Setup Options Selected** prompts you to select the records you want to import for each group of records, such as Security Groups and Award Methodologies.

8. Click **OK**.

If you chose **Import All records for Setup Options Selected**, the In Progress dialog box appears.

If you chose **Import only Specific records for Setup Options Selected**, you are walked through a series of grids, allowing you to specify which records to import, after which the In Progress dialog box appears.

9. Click **OK** to close the In Progress dialog box.
10. Optional: Print the Import Prior Year Queries, Setup, and File Formats report.

These imports are also available from the **Import** dialog box under the **Global** tab after you log into EDEExpress.

***To Perform the Import of Your Prior Year Demographic Data or Prior Year User Data***

1. Select **File, Import** from the menu bar, then choose **Global**.
2. The **Import** screen is displayed. In the **Import Type** field, select **Prior Year Demographic Data** or **Prior Year User Data**.
3. Click **OK** at the bottom of the screen.
4. A confirmation report is displayed indicating the results of the prior year data import.

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## Setting Your Assumed School Code

The first time you use EDEExpress you see the warning “Assumed School Is Not Defined.” You must set your Federal School Code in EDEExpress as the assumed school code.

Follow the steps below to set your assumed school code.

### To Set Your Assumed School Code

1. Select Tools, Setup, Global, School.
2. Click **OK** when you get the message, “No Assumed School.”
3. Click the **Retrieve** button to bring up a list of schools.
  - Select your school from the list by using the scroll bars and click **OK**.
  - Your school’s information appears in the institutional fields.
4. Click the **Assumed School** checkbox to define this as your assumed school.

**Note:** If you are a Direct Loan school and have both an application processing school code and a Direct Loan school code, be sure to use your application processing school code as the assumed school.

5. Click **Save** to save the record.
6. Click **OK**.

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## Resetting Your User ID and Password

If you have forgotten your password, you can have your EDEExpress administrator give you a new one using the User Security function.

### To Access the User Security Function

1. Select **Tools** on the menu bar.
2. Select **Setup, Global, Security Users**.

If you are the EDEExpress administrator and you have forgotten your password, call CPS/WAN Technical Support for help with resetting the password for the default SYSADMIN user ID.

All EDEExpress users, especially EDEExpress administrators, should record their user IDs and passwords and keep them in a safe place.

# System Requirements

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## Hardware and Software Requirements

The following hardware and software components are required for EDEExpress:

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more
- 20 GB hard drive
- A connection to the Internet (analog modem, cable modem, DSL, T1, etc.)

**Note:** A connection to the Internet is necessary to access the Information for Financial Aid Professionals Web site located at [ifap.ed.gov](http://ifap.ed.gov), and the FSAdownload Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov). In addition, an Internet connection must be established in order to enter FAFSA or ISIR Correction data using EDEExpress, since entry is actually done through the FAA Access to CPS Online Web site.

- Dedicated phone line if you connect to the Internet through a modem
- 3.5"/1.44 MB high-density floppy disk drive, including 3.5" high-density double-sided diskettes
- 24x or faster CD-ROM drive
- A sound card
- Windows-compatible keyboard (for example, IBM enhanced 101 or 102 keyboard)
- Microsoft compatible mouse
- Laser printer capable of printing on standard paper (8 1/2" x 11")

- 32-bit operating system (Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x, Microsoft ME, or Microsoft Windows XP)

**Important Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install EDEExpress. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. Once an Administrator has installed EDEExpress, you can run EDEExpress for Windows 2004-2005 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues.

- Super Video Graphics Adapter (SVGA) monitor and video card capable of 800 x 600 resolution (small fonts only) or higher

**Note:** EDEExpress is designed to be viewed with 800 x 600 resolution. You may use a resolution higher than this at your own discretion.

- Microsoft Internet Explorer version 5.X or higher

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# LAN Hardware and Software Recommendations

The following hardware and software components are recommended for running EDEExpress in a LAN environment:

- IBM or fully IBM-compatible PC with a Pentium III processor (800 MHz) or better
- 128 MB total memory or more on each workstation
- 20 GB hard drive available hard disk space on the file server and 600 MB available on the network drive. (This depends on the number of records you will store in your database.)
- Desktop Operating System: Microsoft Windows 98, Microsoft Windows 2000, Microsoft Windows NT 4.x, Microsoft ME, or Microsoft Windows XP

**Important Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install EDEExpress. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. Once an Administrator has installed EDEExpress, you can run EDEExpress for Windows 2004-2005 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues.

- Network Operating System: Novell NetWare versions 3.12 or above or 4.11 or above, Windows 2000 Server, Windows 2000 Advanced Server or Microsoft Windows NT 4.0

**Note:** Novell NetWare versions 3.12 and 4.11 are separate products.

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports
- Super Video Graphics Adapter (SVGA) monitor and video card capable of 800 x 600 resolution (small fonts only) or higher

**Note:** The EDEExpress software is designed to be viewed with 800 x 600 resolution. You may use a resolution higher than this at your own discretion.

Refer to "Systems Requirements" for a complete listing of the general hardware and software required for EDEExpress.

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## **Recommended Items to Consider**

We strongly encourage you to use the following additional tools to assist you in managing and protecting your financial aid data:

- Backup system (for example, a tape backup system) to store your data
- Power supply backup or surge protectors
- Phone line surge protector
- Virus scan software



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## Estimating Hard Disk Space

The following information gives you an estimate of how much hard disk space is required for each ED software product and for certain types of records.

To find out the approximate total space required, add together the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 ISIR, National Student Loan Data System (NSLDS), Packaging, Pell, and Direct Loan records using all of the software products listed is approximately 119 MB.

Each software product requires the following space:

Product	Size
EDExpress for Windows	16 MB
EDconnect for Windows	15 MB
DL Tools for Windows	5 MB
Student Status Confirmation Reporting (SSCR)-32 with 300 records	6 MB

Each set of 5,000 records requires the following space:

Record	Size
ISIR	16 MB
NSLDS	7 MB
Packaging	3 MB*
Pell	2 MB**
Direct Loan	49 MB***

\* Includes only ISIR data imported into Packaging, for example, no budgets added, no records packaged, etc.

\*\* Includes two anticipated disbursements per origination record

\*\*\* Includes origination records only; no disbursements

# Local Area Network (LAN) Information

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## Installing the Software on a Network

### Installation Options

You can install the software to a LAN using one of three options:

1. **Network Server.** Use this option when you are installing EDEExpress for Windows 2004-2005 to a networked database for the first time and want to install all available EDEExpress software modules.

**Warning for Subsequent Installations:** Use caution when using the Network Server installation option. The program overwrites, removes, and erases your existing EDEExpress database (expres45.mdb).

2. **Workstation Full.** Use this option when you are installing EDEExpress for Windows 2004-2005 on a workstation that will be used to access a server-based copy of the database for the first time and want to install all available EDEExpress software modules.

**Warning for Subsequent Installations:** Use caution when using the Full installation option. The program overwrites, removes, and erases your existing EDEExpress database (expres45.mdb) and all program files (including expres45.exe), as well as any annotations you may have made to online Help.

3. **Workstation Custom.** Use a Custom installation in one of two ways to install components of the software to a workstation that will be used to access a server-based copy of the database. If you have previously installed a module the module will not appear in the Select Components dialog box, it will automatically be installed.

- If you have already installed a Workstation Full release of EDEExpress, you can use this option to add a particular file or files; for example, executable (\*.exe) files and help (\*.hlp) files. This option leaves all other database and system settings intact.
- To upgrade the software, choose Workstation Custom installation and select all files except your existing database files (\*.mdb). In EDEExpress Release 1.0, Stand-Alone Full installation is the default selection.

**Important Installation Note:** If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install EDEExpress. If you are not an Administrator, you will receive a warning when you try to install EDEExpress. Once an Administrator has installed EDEExpress, you can run EDEExpress for Windows 2004-2005 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. There are no workarounds for these Windows rights issues. Please consult with your school's technical department if you receive a warning that the software must be installed by an Administrator when you try to install EDEExpress.

## Installation Instructions

Follow the instructions in this section for installing the software on a network. For example,

- If you are installing EDEExpress for the first time, do a full installation and follow the steps provided in "First Time Network Installation."
- If you are installing EDEExpress after you have created data in the database, follow the instructions provided in "Subsequent Network Installation."

When you perform a workstation installation, the executable file for EDEExpress (**expres45.exe**) and all other program files are installed to a workstation's local hard drive. **Do not** install the program files to your server.

The installation modifies all EDEExpress program group icons in your Windows Start Menu folder to point to the executable file on your local hard drive.

Installing this file to the workstation's hard drive rather than the network file server improves the speed and performance of the software because EDEExpress uses the combined resources of the workstation and the file server instead of those of the file server alone.

Follow the instructions on the next page to install EDEExpress to a LAN.

**Note:** The EDEExpress software may be installed in "safe mode" but cannot be run in safe mode.

**Note:** Be sure that all Windows applications, including screen-savers and e-mail notifiers, are closed before you proceed with this setup.

## First Time Network Installation

### *To Install the Software on a Network for the First Time*

1. First, select the Network Server installation option to install only the EDEExpress for Windows 2004-2005 database (**expres45.mdb**) on the file server, not the EDEExpress program files.
2. Enter the network server location where you want to install EDEExpress for Windows 2004-2005 database files.  
Type the path or click the **Browse** button.
3. Follow the prompts provided by the **Setup** program.
4. Second, perform a **Workstation Full** installation on *all* workstations that will access the server-based copy of the database for this release of the software. The Workstation Full option installs all program files, including the executable file (expres45.exe) in a local hard drive folder.

The Workstation Full installation option prompts you for the location of the database installed during the Network Server installation (step 2).

### **Additional Instructions**

You are asked two location questions during a Network Workstation installation:

- The software first prompts you to enter the location of the database on the server. This question is asking where your database is located, not where you want the software installed.
- After the software has located the database, the software asks you where you want to install the program files. Your response should be the default location, **C:\Program Files\EDESuite\EDEExpress for Windows 2004-2005**, or another local designation.

## Subsequent Network Installation

### ***To Install the Software on a Network Where the Software Is Already Installed***

1. **Do not** use the Network Server installation option for a subsequent network installation of the software. The Network Server installation option is only for users installing EDEExpress for Windows 2004-2005 to a network file server for the first time. Choosing this installation option installs an empty EDEExpress database file (expres45.mdb) on the network file server, overwriting any existing database.

If you do select the Network Server installation option for a subsequent network installation of the software, the installation program alerts you that EDEExpress for Windows 2004-2005 has already been installed in the specified directory, and asks if you want to overwrite the existing release. Select **No**.

2. Click on the **Workstation Custom** installation option.
3. You are prompted to select the components you want to install.
4. You are then prompted for the location of your EDEExpress for Windows 2004-2005 database file (expres45.mdb) during the EDEExpress Network Workstation installation.
5. If this is a subsequent release of the software, the database is updated only once, after all workstation installations are complete. This action occurs when the software is accessed for the first time after the upgrade. When the first user logs into EDEExpress, the update runs. Subsequent installations will not update the database again.

**Note:** All workstations should be upgraded with the latest release before you open the software to obtain the database update message. If you fail to do this, any workstation not updated receives a database mismatch error message if a user tries to run EDEExpress.

6. Follow the prompts provided by the Setup program.

**Note:** If you are adding a workstation to your network environment, perform a **Workstation Full** installation of the current release of EDEExpress for that workstation.

### ***To Install Subsequent and Future Releases***

For this release and all other future releases of EDEExpress for Windows 2004-2005, you must do a **Workstation Custom** installation to ensure the database structure is updated but not overwritten. Make sure the Database option is **not** selected on the Select Components screen during the Custom workstation installation.

Follow the instructions for “Subsequent Network Installation.”

## Instructions for Schools with Diskette Directories on a Server

### *To Install the Software Using Diskettes*

If you want to copy the installation diskettes to a file server so you can do workstation installations from the server, use the following steps:

Create a disk folder for each diskette folder downloaded. For example, if you download six diskettes, then create six directories on the file server as displayed below:

\Install

\Install\DISK1

\Install\DISK2

\Install\DISK3

\Install\DISK4

\Install\DISK5

\Install\DISK6

**Note:** The parent folder can have any name, but the subdirectories must be named DISK1, DISK2, etc.

1. Copy the contents of each disk into its corresponding folder on the server.
2. You can now install EDEExpress from the file server by running **setup.exe** from the DISK1 folder on the server instead of carrying the diskettes to each workstation.

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## LAN Server Compatibility

EDEExpress can be used as single-user or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x, 4.x, and 5.x
- Microsoft Windows NT Server 4.x
- Windows 2000 Server
- Windows 2000 Advanced Server

**Caution:** You should not run the software on peer-to-peer networks such as Artisoft LANtastic, Microsoft Windows for Workgroups, or Novell's Personal NetWare.

According to the Microsoft Knowledge Base, some anomalies have been known to occur when using Microsoft Access with the following networks:

- DEC Pathworks
- IBM LAN Server
- Sun PC-NFS

Since EDEExpress makes extensive use of Microsoft Access as a database engine, do not use these network operating systems with EDEExpress.

## LAN Cautions

When multiple users are concurrently updating the database(s) in the software, the student records being modified are locked. Also, certain functions are locked when concurrent access would degrade the system or disrupt a process.

Examples include:

- The database is locked when the executing function is mass loading records, such as the Import function.
- Records are locked when an executing function needs stable data for updating or printing.

- Functions are locked when multiple executions of the functions would destroy the databases.

These functions include:

- User Database (creating or deleting)
- Repair and Compact Database
- Verify Database

While you are using the Utility functions listed above no one else should access EDEExpress for Windows 2004-2005.

## **LAN Messages**

### ***Novell***

These messages notify users when a locking situation occurs:

#### **LAN Error Message**

##### **Condition**

**<Database> is locked and cannot be accessed at this time.**

If the database remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point prior to execution.

##### **Record in use - Retry later.**

If the record remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point prior to execution.

##### **Function in use - Retry later.**

If the function remains locked after five seconds of continual attempts, you are returned to the menu bar.



## **Windows NT**

Your Windows NT server should be optimized to maximize throughput for file sharing. To do this, log on to the NT server console, then:

1. At the server control panel, go to **Start, Settings, Control Panel, Network**.
2. On Network screen, choose the **Services** tab.
3. Select **Server** from the list by double-clicking on it.
4. Mark the **Maximize Throughput for File Sharing** button.

**Note:** Should you encounter problems performing this network installation, contact your school's network administrator for assistance.

Both the location and the size of the paging files on the NT server are important to the functionality of the software. The size of the paging files on the server should generally be higher than what Microsoft recommends. If possible, move the paging files from the drive where the EDEExpress software is located, even if it means putting them on the system drive.

If your NT server partition, where the database is located, is an NT File System (NTFS), remember that the folder path is case-sensitive.

The financial aid group must own the folder, as well as all files in the database folder, on your NT server.

All users must have Change (delete, create, execute, read, and write) or higher permission to access the EDEExpress database and downloaded folder, as well as the files in each of those folders.

## **Windows 2000 or XP**

Windows NT has only two security groups, Users and Administrators. People assigned to the Users group in Windows NT can install and run most software. Microsoft added an additional security group to Windows 2000/XP, the Power Users group. Users in the Power Users group have roughly the same security privileges as Users in Windows NT. The Users group in Windows 2000/XP is designed to be limited and has a greatly reduced set of privileges.

If you use Windows 2000 or Windows XP, you must be an Administrator on your workstation in order to install EDEExpress. If you are not an Administrator, the installer warns you that you do not have sufficient rights to install the software. Once an Administrator has installed EDEExpress, you can run EDEExpress for Windows 2004-2005 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or “domain”) as well as on your workstation. There are no workarounds for these Windows rights issues.

Going to [microsoft.com](http://microsoft.com) and performing a search for "file protection" will provide Microsoft articles explaining the technical details of Windows 2000/XP file protection.

## **Additional LAN Instructions**

If you are using a NetWare product, please enter the following commands from the NetWare Server Console prompt:

**Set Maximum Record Locks Per Connection = 10000**

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

# Getting Help

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## Basics

There are a number of ways to get help with the installation of EDEExpress:

- Review installation instructions.
- Become familiar with your PC.
- Contact your system administrator.
- Use EDEExpress online Help.
- Contact Technical Support.
- Sources of Assistance for Schools

These approaches are described in the succeeding sections.

## Review Installation Instructions

If you have problems installing EDEExpress, first review the installation instructions again.

Try repeating the installation process (make sure you include all steps).

If you are still having difficulty, contact CPS/WAN Technical Support.

## Become Familiar with Your PC

Once you have successfully completed the EDEExpress installation, click **System Information** from the Help menu.

Compare this information to the required configuration listed at the beginning of this section. You may need to upgrade your equipment or your system's configuration.

## Contact Your System Administrator

Your school or organization may have additional instructions for your PC. For example, you may get an error if you are trying to install the software to a drive for which you do not have access.

## Use EDEExpress Online Help

Instead of a paper user's guide, EDEExpress has online Help.

General help is available from the menu bar and field help is available by pressing the **F1** key.

See the topic "Using Help" in the online Help for more information.

You can access online Help by any of the following methods:

- From the **Help** menu, choose a help command.
- Choose the **Help** button available in most dialog boxes.
- Use the keyboard to select an item on a menu, and then press **F1** to see a description of the item.
- Select a dialog box option or command and then press **F1**, or click the **Help** button to move directly to an explanation of the option.
- Use the **Context Help** toolbar button to obtain help on menu options and other toolbars.

## Technical Support

### **Contact FSA Technical Support**

FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's FSA systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, visit the FSA Schools Portal Listservs & Mailing Lists:

[ed.gov/offices/FSA/services/fsatechsubscribe.html](http://ed.gov/offices/FSA/services/fsatechsubscribe.html)

For FSA technical support, post an e-mail (including your TG number and all pertinent contact information) with your question. You will receive a response from FSA staff or the financial aid partner responsible for the system which you have a question about.

**Note:** You must subscribe to FSATECH in order to send and receive messages from the list.

### **CPS/WAN Technical Support**

CPS/WAN Technical Support can assist you with any questions regarding:

- Technical assistance
- Software functionality
- ISIR/custom file layouts
- EDconnect functionality

Call CPS/WAN Technical Support at:

**800/330-5947**

**TDD/TYY: 800/511-5806**

or e-mail your inquiries to CPS/WAN Technical Support at:

[cpswan@ncs.com](mailto:cpswan@ncs.com)

See the topic "CPS/WAN Technical Support" in the online Help for more information.

Representatives are available to assist you between 7 a.m. and 7 p.m. (CT), Monday through Friday, excluding holidays.

## Guidelines for Calling Technical Support

When you call CPS/WAN Technical Support, you must be at your PC and prepared to provide the following information:

- Your TG ID (TG followed by a 5-digit number).
- The release of the software you are using (under Help/About EDEExpress for Windows).
- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, available disk space, and type of memory management being used).
- The exact wording of any error messages you received, as they appeared on your screen.
- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.
- A description of any resolution steps you took prior to calling.

## CPS/WAN Voice Response System

The CPS/WAN Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to **enter 1** for an English-speaking operator or **enter 2** for a Spanish-speaking operator.

## Sources of Assistance for Schools

*Sources of Assistance for Schools* is a document that contains helpful contact information for all FSA programs, including frequently used help lines, e-mail addresses, and Web sites. You can download the *Sources of Assistance for Schools* from the FSAdownload Web site located at [FSAdownload.ed.gov](http://FSAdownload.ed.gov).